

How to use the online Federation Expense Reporting Tool

1. Go to <http://msl.mt.gov/>
2. Go to For Librarians
3. Go to Library Directory
4. Select Edit path
5. Select your city, click search
6. Select your library
7. Enter your directory password. If you don't know it, contact the Montana State Library at 1-800-338-5087
8. At the bottom of the list, there will be a heading for **Federation Expenses**.

After you have clicked on **Federation Expenses**, you have several choices -

Programs – if you click **View** here, you will see a listing of all the programs under your Federation's Plan of Service (POS).

Federation award – the first thing you will need to do before you can access your online tracking report is to **confirm the award**. Once you've done this, you can click **View** to see the funds your library received for each program.

Expenses – click on **Add** when you want to add an expenditure to your report. You can edit any previously added expenses.

Claimant - put in who/where the money was spent – example, if you paid for MLA conference, you could put MLA here.

Tracking number - an optional box for you to use if you use tracking or PO numbers.

Federation Amount and Local Amount – you will see two boxes – one for federation monies and one for local dollars. You are only required to enter the amount of federation funds expended. When using this column please only enter the amount of federation dollars. For example, if you had \$200 in your plan of service for CE and you attended an event that cost \$500, you enter \$200 since that is all that is available. If you would like to keep track of the local dollars that have been spent please enter that in the local amount column. Using the above example means that you would enter \$300 into the local amount column.

Program - pull down and select the program that this expenditure falls under.

Description – describe how/what/where the money was used. Write a thorough, yet succinct explanation of how the money was used.

Benefit – focus on outcomes and benefits to your library and patrons.

When you are finished entering an expense, click **Add Expense** at bottom of the page. If you've made any mistakes or would like to change anything, you can edit any item at any time.

There is also a **Final Report** option where you can print a copy of what you have input. You can print a final report at any time.

Things to remember –

1. You access this tool just like you do your entry in the library directory.
2. Enter your expenses as you go. Don't wait until the end of the program year to try to remember how you used your money. This tool is meant to make tracking easier for you and the Federation Coordinator.
3. Spend your money throughout the year. Don't wait until the middle of June and try to figure out how you can use it up quickly.
4. If you ever have questions about whether an item is eligible for federation funds, contact your federation coordinator or the State Library